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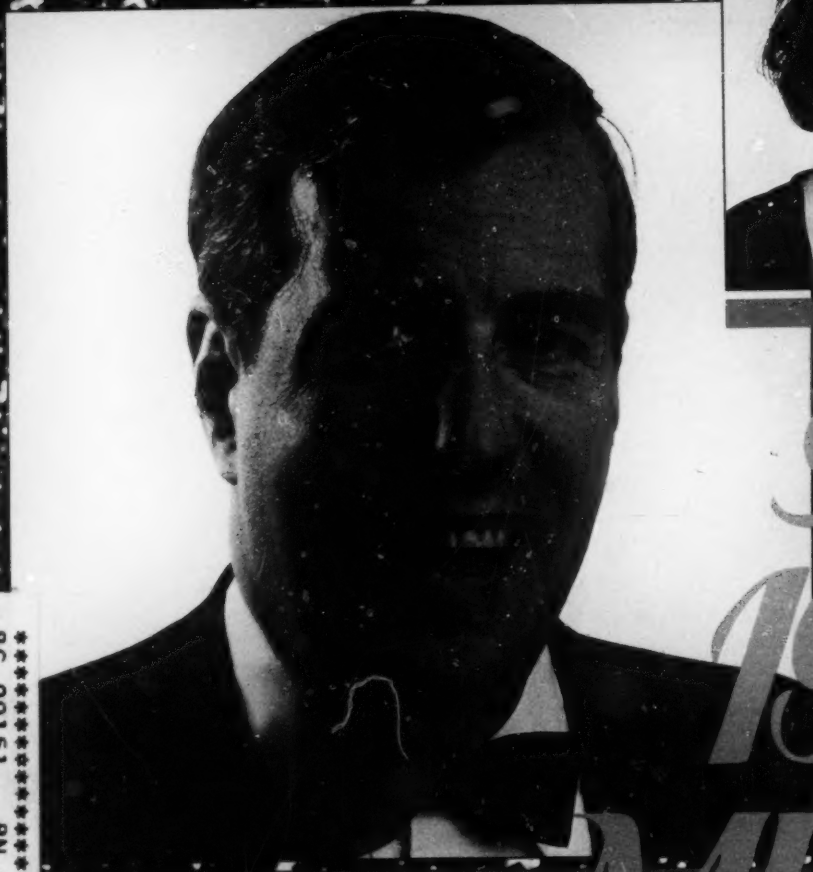

THE 1987 MEDIA ALL STARS

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MARKETING & MEDIA
DECISIONS

December 1987, Vol. 22, No. 12

COVER STORY

THE 1987 MEDIA ALL STARS

The clients have spoken, and we have listened. The result is The 1987 Media All Stars, a team of media department professionals who embody the skills that make a difference when planning and buying media, plus eight others who have attracted particular attention this year. They offer a portrait of today's ideal media department.

MEDIA DIRECTOR: GEORGE W. SHARPE II 30

Details, details, details. Not one is overlooked by Sharpe at Young & Rubicam. Star Watch: Camille Johnson, Chiat/Day.

ASSOCIATE MEDIA DIRECTOR: WILMA EPSTEIN 39

She's a rebel, and it's her unconventional thinking that leads to her most innovative media strategies at Ogilvy & Mather. Star Watch: Marian Ceschin, Foote, Cone & Belding.

NATIONAL BROADCAST: BOB IGIEL 45

You know this guy's a star when even Coca-Cola, a non-Ayer client, dubs him the best in the business. Star Watch: Steve Grubbs, BBDO.

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PRINT: DAVID LEHMKUHL 57

His statesman-like approach to print has earned him tremendous respect from sellers and special print opportunities for N W Ayer's clients. Star Watch: Doug Hochstadt, J. Walter Thompson.

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She's a tough negotiator who gives "150%" at BDA/BBDO. Star Watch: Tamara Meldrum, HDM.

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COVER PHOTO CREDITS: Steven Begleiter, Mike Fletcher, Richard Flynn, Mike Horan, Bard Martin, Chuck Slade, Larry Thomas. Background: Maria Ferrari.

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DIRECT MARKETING

by Rebecca Fannin

$33.9 BILLION, AND GROWING

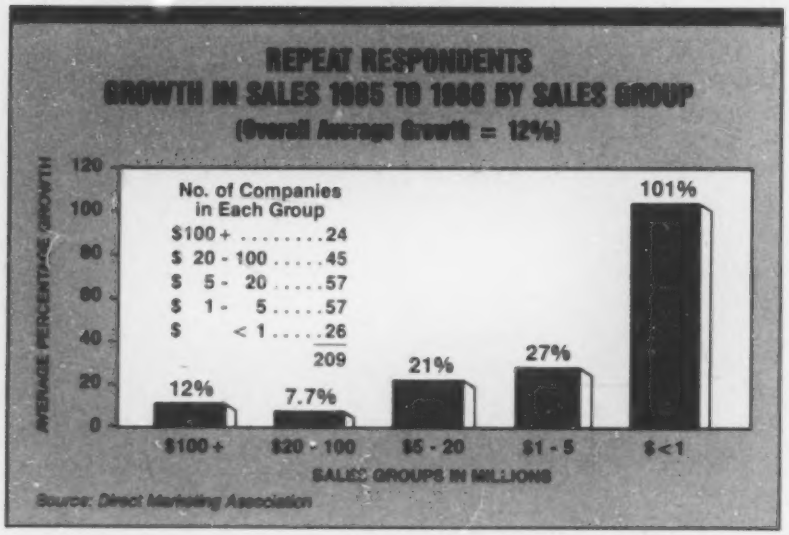
The long-awaited study of the size of the direct-marketing industry was recently completed by audit firm Arthur Andersen & Co. The results, which were revealed at the annual Direct Marketing Association (DMA) convention, show a sales volume of $33.9 billion by for-profit, nonfinancial members of the association.

That represents a growth rate of 12% for respondents that had also supplied figures last year.

In addition, direct-response advertising expenditures, including outbound telephone marketing costs, were reported at $3.3 billion. Catalogs represented 47% of these expenditures, while direct mail accounted for 41%.

The survey also found that 16% was the average direct-response advertising-to-sales ratio for nonprofit, financial members. It was 19% for mail order, 8% for retailing, 33% for publishing, 16% for manufacturing and 7% for wholesaling.

The survey had a 36% response from a universe of 399 firms. It's intended that the survey will be expanded next year to include insurance and credit cards. There are also plans to survey nonmembers.



CONVINCING THE UNCONVINCED

In a continuing effort to try to learn why more consumers don't shop by direct mail, the DMA has been supporting a four-year, industry-wide research project. Recently, the results of its first year of study were released.

Although many of the findings seem obvious, the DMA hopes seeing them in black and white might forestall errors made by marketers.

For instance, in exploring the attitudes and perceptions of infrequent home shoppers, the DMA found that consumers were aware of the benefits of shopping at home — convenience and ease of shopping 24 hours a day, ability to comparison shop and locate unique items. However, the consumers interviewed felt the benefits were overshadowed by potential problems and inconvenience in returns.

Focus-group feedback suggests light buyers are concerned that they will be dissatisfied and will regularly have to return ordered items. Their concerns were based, however, on skepticism and hypothetical possibilities, not on their own experience.

Infrequent shoppers worried that companies might not trust them when they report that an item was received damaged. And some mentioned that repacking is troublesome and return postage expensive.

The interviews further showed that infrequent home shoppers are unaware of the processes for solving a purchase problem.

As for toll-free numbers, current shop-at-home customers find them very appealing, because they give them more direct control over their transactions. Infrequent shoppers, however, have a low awareness level about 800 numbers, whether it's for placing orders or obtaining product information to check the status of delivery.

The focus sessions were held in Chicago, San Francisco and in Fort Lee, N.J. They included shoppers who had made at least one but no more than two direct-mail purchases within the past year. Participants included single and married males and females with household incomes of at least $25,000. The qualitative research was conducted by Tracy Research in New York.

As a result of the research findings, the DMA has developed a booklet of recommended practices for marketers. The DMA is also is working on industry-specific booklets.

In another move, the DMA has created a Shop-at-Home Information Center, which is being headed by Lisa Caugherty, a former senior account executive at Doremus Porter Novelli where she managed the *Reader's Digest* account. Caugherty plans to publish a consumer information booklet about shopping at home.

evision costs that are currently up 20-25% year on year and show no sign of falling; the failure of radio to provide a viable national alternative; and a recent circulation upturn for both women's monthlies and weeklies. Only a pessimist would say the UK press's future looks anything but healthy for advertisers.

There are, however, pitfalls for both publishers and advertisers. While we of the latter must insure that value is achieved, we must also be sure not to devalue the product and create a commodity. After all, value is as much the "quality of the audience as the price paid." Similarly, the publisher should not solely rely on converting existing business to "more profitable color" but look to grow the advertising category from other areas, especially television.

Whatever the individual publisher's approach, we are assured that by mid-1988, if not before, the national press market will offer a tremendous new opportunity for those advertisers contemplating the use of either color or mono print in their UK advertising plans. ■

RESEARCH

Steve Sternberg
Vice president, manager of broadcast research, Bozell, Jacobs, Kenyon & Eckhardt

VCRs: IMPACT AND IMPLICATIONS

For the past several years, Nielsen has included videocassette recorder (VCR) data, without simultaneous viewing, in its measurement of household ratings and usage. There has been considerable industry debate over this policy, due in part to Nielsen's own research that indicates:

- Roughly 70% of all recordings are not viewed while being taped.
- About 25% of these recordings are not played back.
- About 60% of recordings played back involve the use of fast-forward over commercials.

It should be noted, however, that this data is based on a special Nielsen diary — not the most precise measurement tool — and many feel that there is even a greater incidence of fast-forwarding than has been reported.

Chief concerns are that this produces rating losses and, consequently, higher commercial CPMs for advertisers.

Background. Nielsen's decision to include VCR recording in its household measurements came at a time when VCRs were in less than 10% of U.S. homes, and it was more a function of convenience than anything else. Few expected such a rapid growth in VCR sales. Indeed, two years ago, VCR penetration was at about 30%, and most industry experts expected it to reach 50% in 1990, at the earliest. Well, according to Nielsen, VCR penetration has hit 50%, and we expect it to approach 70% by 1990 (see below).

For the past few years, several ad-

CHART I
VCR PENETRATION TREND
(FALL OF EACH YEAR)

1980	2%
1981	4%
1982	6%
1983	11%
1984	17%
1985	29%
1986	41%
1987	50%
1988 (projected)	60%
1989 (projected)	70%

Source: A.C. Nielsen (1980-1987); BJK&E estimates (1988-1990)

CHICAGO'S "OTHER PAPER" HAS BECOME "OTHER PAPER."

	CHICAGO SUN-TIMES	CHICAGO TRIBUNE
Total Adults	1,956,900	1,760,600
Total Men	1,067,400	849,900
Total Working Women	570,400	514,000
Adults 18-34	830,800	567,100
Adults 35-49	501,000	497,200
Household Income $25,000 & Over	1,236,500	1,203,000

Source: Simmons, ADI Daily Audiences, 1987

Chicago Sun-Times

vertisers and agencies have been calling on Nielsen to discontinue including VCR recording in its household measurements, claiming that they are paying for too many viewers who are not exposed to their commercials, and that these taped ratings represent little or no value to advertisers.

The networks, on the other hand, maintain that VCRs create new viewers who otherwise may not have watched the program and that these additional ratings represent real viewers with just as much opportunity to see the commercials as the live audience, who, instead of fast-forwarding, often zap commercials or leave the room during the commercial.

Both the advertiser and network positions are understandable, but both, of course, miss the point. If you include VCR recording, you are undoubtedly attributing some viewing where it doesn't exist; if you delete VCR recording, you are omitting some real viewers.

The obvious solution is measuring actual playback activity.

Measuring the VCR audience. In September 1988, Nielsen will have its playback-measurement technology in place (AGB's is slated for September 1987), and only then will we be able to assess the impact of VCRs on persons viewing and answer these important questions:

- How much of the recorded material is played back, and how long after the original telecast is it viewed?
- How does the playback audience differ from the live audience?
- What percentage of commercials are fast-forwarded?
- What types of commercials are least likely to be "zipped"?
- Is the time-shifted viewer as valuable to advertisers as viewers of the original telecast?
- How much of VCR play time is due to tape rentals?

It should be recognized that while it is important to have household data for "VCR contribution to network ratings," advertisers and their agencies are more concerned with target groups of people. Such data is currently unavailable.

During the upcoming broadcast year, Nielsen will be using the controversial VCR ascription methodology to estimate VCR contribution for people. Ascription basically takes the percent difference between household ratings with VCR recording and household ratings without VCR recording and applies it uniformly across the board to all demographic segments.

BJK&E will not use Nielsen's ascribed VCR data in its negotiations with the networks.

Bozell, Jacobs, Kenyon & Eckhardt has expressed its displeasure to Nielsen concerning VCR ascription. We see no reason to further muddy the already murky waters. It is reasonably clear, for example, that a female-oriented program such as *Knots Landing* has a greater percentage of female taped viewing than male, whereas the reverse is true for a male-oriented program such as *Crime Story*. VCR ascription erroneously allocates the same percentage of VCR playback for all demos, regardless of a particular program's audience skew, and assumes that playback mirrors live viewing.

In response to agency protests, Nielsen will be releasing "live viewing" reports concurrently with its regular ascribed pocketpieces, and pocketpiece tapes will contain both live and ascribed data. Nielsen is thereby taking the easy way out of the controversy and is leaving it up to the agencies and networks to negotiate over which to use. It is Bozell, Jacobs, Kenyon & Eckhardt's position that we will utilize the live-audience data in our negotiations with the networks.

With AGB planning to have VCR playback ratings this year, we should gain some insights into how best to utilize the data when Nielsen's is on line.

VCRs' impact on network ratings. While the amount of VCR contribution to network ratings, as reported by Niel-

WE'VE GOT PLANS FOR YOU!

When it comes to reaching the Chicago market, we mean business. Let us show you how your advertising can reach more readers — and still do it for a lot less! Just complete this ad, and mail it to: Chicago Sun-Times Advertising Sales Department 401 N. Wabash Ave., Chicago, IL 60611

☐ YES, I'm interested in making new plans. Please contact me.

☐ NO, I'm not convinced. Please contact me.

NAME/TITLE_____

COMPANY_____

ADDRESS_____

CITY _____ STATE_____ ZIP_____

PHONE_____

Chicago Sun-Times

sen, is currently minimal (about 2% or 3% on average), it should be noted that Nielsen's sample understates VCR ownership. The people-meter sample has brought this more in line with the real world, and as VCR penetration increases, VCR recording could have a more significant impact on network ratings.

Following is a look at some highlights from Nielsen's 1987 reports on VCR activity:

- On average, between 2% and 3% of prime-time program audiences for regular programs were attributed to VCRs.
- Between 70% and 80% of regularly scheduled prime-time programs had VCR contributions of 3% or less.
- Movies and soap operas represented the most commonly recorded programs; sitcoms were the least recorded.
- Prime time and Monday-Friday (M-F) daytime accounted for 70% of recording time — 39% and 31%, respectively — but only 40% of play time, which includes tape rentals (see Chart II for this and all following data).
- Prime-time recording is generally highest during November and February (sweep months), when the networks air their strongest programing, often competing with each other. But during the summer, when the networks air mostly repeats, M-F daytime has more recording time as the soaps continue their slow but steady pace.
- Early fringe only represented 4% of recording time but accounted for 15% of play time. This could be partly due to people recording daytime soaps and then watching them when they come home from work (focus groups have indicated that this may be the case).
- Late fringe was next in terms of play time with 11%. This is perhaps an indication that many are recording prime-time programs for viewing later that night.
- On a nightly basis, Sunday accounted for 21% of weekly recording, no doubt because of the three competing movies. Monday, Tuesday, Thursday and Friday were next, evenly distributed at about 14% each. Wednesday and Saturday had the least amount of recording, each with 11%.
- Saturday led the way with 20% of weekly play time, possibly much of it in tape rentals. Sunday and Friday were next with 17% and 15% respectively. The other nights were evenly distributed at 12% apiece.
- The most recorded regular prime-time programs, of those renewed, were generally younger, more urban-skewing programs (the top dozen in February were *ABC Monday Movie, ABC Sunday Movie, Crime Story, Miami Vice, Ohara, NBC Monday Movie, L.A. Law, Knots Landing, Disney Sunday Movie, Dallas, Dynasty* and *Cheers*).
- Returning programs that had the least amount of VCR contribution were mostly older, more rural-skewing (the bottom dozen were *60 Minutes, Our House, Facts of Life, 227, My Sister Sam, Kate & Allie, Highway to Heaven, Head of the Class, Perfect Strangers, Amen, The Bill Cosby Show* and *Newhart*).
- The above two points seem to validate studies that have shown VCRs to be used primarily by people under 40, and penetration is currently greatest in larger, urban markets. This should change as VCR ownership continues to expand to the rest of the country (contact Nielsen for DMA breakdown).
- Some daytime soaps had a greater percentage of VCR contribution than most prime-time programs, most notably *All My Children* and *Days of Our Lives*.
- In February, the average VCR household spent three hours, 32 minutes of recording time and four hours, 59 minutes of play time (including tape rentals) per week.
- In February, 49% of all recording was done while the tv was off, 33% with the set tuned to the same channel and 18% with the set tuned to a different channel.

CHART II
SHARE TREND OF VCR RECORDING AND PLAY TIME DISTRIBUTION BY DAYPART
(June 1986 - May 1987)

	Record	Play	Total VCR Activity
Early Morning (M-F, 6-10 a.m.)	2%	5%	4%
Daytime (M-F, 10 a.m.-4:30 p.m.)	31%	16%	24%
Early Fringe (M-F, 4:30-8 p.m.)	4%	15%	9%
Prime Time (M-Sun., 8-11 p.m.)	39%	27%	33%
Late Fringe (M-Sun., 11 p.m.-10 a.m.)	8%	11%	9%
M-Sun., 1-6 a.m.	6%	6%	6%
Sat./Sun., 8 a.m.-1 p.m.	3%	7%	5%
Sat. 1-8 p.m.	3%	7%	5%
Sun., 1-7 p.m.	4%	6%	5%
Total Day	**100%**	**100%**	**100%**
PRIME TIME (Sept. 1986 - May 1987)			
Monday	14%	12%	13%
Tuesday	14%	12%	13%
Wednesday	11%	12%	12%
Thursday	15%	12%	13%
Friday	14%	15%	15%
Saturday	11%	20%	15%
Sunday	21%	17%	19%
	100%	**100%**	**100%**

Source: A.C. Nielsen

If the shoe doesn't fit, would you wear it?

Then why pay for coverage that's an odd fit?

Meredith's brand new *Custom Coverage* Program will fashion a plan to *your* specs—geographic, demographic, psychographic or by product usage. Our 27 magazines—usable in millions of combinations—offer matchless flexibility and depth of coverage.

And we'll build a merchandising/sales support program that's a lot more than counter cards and whistles.

Put your best foot forward—with savings and a whole lot more. Call Wes Silk, Gerry Wroe or Bill Murphy, (212) 557-6600.

MEREDITH'S
CUSTOM
COVERAGE
PROGRAM

Better Homes and Gardens, Ladies' Home Journal, Metropolitan Home, Successful Farming, Country Home, Midwest Living, Wood, Sail.

Special Interest Publications: Building Group, Furnishings Group, Crafts Group, Food Group, Lifestage Group.

• Network affiliates accounted for 72% of recording in February, with independents at 11%, pay services 9% and PBS and cable origination at 4% each. Network affiliates were the source of 76% all prime-time recording and 92% of all M-F daytime.

Considerations for the future. In programing:

• For time shifting to play a major role in program scheduling, there would have to be a large percentage of viewing while recording other stations (currently pegged at only about 20% of recording activity).

• Hit series, appealing primarily to different audiences (such as the female and older-skewing *Dallas* and the male and younger-skewing *Miami Vice*, which were virtually tied via the people meter last season) may be scheduled opposite one another more often.

• Hit programs may become less vulnerable to attack, thereby extending their runs.

• The idea of a strong lead-in creating a hit out of a weak series may diminish, since that time could be used for playback.

• There may be more first-run programing in the summer, since people could just tape a program if they're out of the house or even on vacation for a week or two.

• As playback increases in early fringe, Saturday morning and late night, the networks and local stations may be forced to more aggressively program these dayparts.

On commercials:

• Studies have indicated that highly entertaining commercials will cause many viewers to temporarily stop fast-forwarding.

• The only time we know that a person has his/her eyes on the commercial is when it's being fast-forwarded, so we're not necessarily losing the full impact. Perhaps something like keeping a recognizable logo on the screen is a partial solution.

• The shorter the commercial, the less probable will be its effectiveness during zipping.

• Advertising on prerecorded tapes seems like the next major commercial medium. It is essential that these ads be entertaining and preferable that they tie in to the movie that follows (e.g., Pepsi's much-discussed commercial on

the *Top Gun* video).

On potential benefits to advertisers:

- Highly recorded programs might present an added bonus to advertisers if they are played back more than once.
- Taped viewing is probably a more solitary activity than live viewing. Much taping probably takes place because the family wants to watch one thing and the individual something else. Viewers-per-set for taped viewing are likely to be lower than for live viewing. This could mean greater attentiveness, since not only are there fewer distractions, but it's a program the viewer selected and really wants to watch.

By the year 2000, 90% of the U.S. households could be VCR-equipped. Now is the time for advertisers and networks alike to consider how to deal with VCR recording.

VCRs are still in their infancy but have grown at a faster rate than color television or cable during their beginnings. Only television itself has grown at a faster rate than VCRs. Unencumbered by some of the obstacles facing cable penetration in large urban areas, we believe that by the year 2000, over 90% of U.S. households could have at least one VCR.

We also know that VCR usage changes with length of ownership. After the initial novelty wears off, and the backlog of movies we've always wanted to see is exhausted, people tend to settle in to more time-shifted viewing.

While this currently does not have a significant effect on ratings, its impact will undoubtedly increase with each passing year. Now is the time for advertisers and networks alike to consider how to deal with VCR recording. ■

Would you buy a suit that doesn't fit?

Then why pay for coverage that needs tailoring?

Meredith's brand new *Custom Coverage* Program will build a plan to *your* specs—geographic, demographic, psychographic or by product usage. Our 27 magazines—usable in millions of combinations—offer matchless flexibility and depth of coverage.

And we'll build a merchandising/sales support program that's a lot more than counter cards and whistles.

Our custom tailors are ready to provide savings—and much more. Call Wes Silk, Gerry Wroe or Bill Murphy on (212) 557-6600.

MEREDITH'S
CUSTOM
COVERAGE
PROGRAM

Better Homes and Gardens, Ladies' Home Journal, Metropolitan Home, Successful Farming, Country Home, Midwest Living, Wood, Sail.

Special Interest Publications: Building Group, Furnishings Group, Crafts Group, Food Group, Lifestage Group.

BRAND REPORT

No. 148: Skin-Care Treatment Products

VANITIE$

by Phyllis Fine and Margaret Vogel

Facial skin-care products — and ads — have come a long way from the innocent days of "She's engaged! She's lovely! She uses Pond's!"

With companies spending millions on research and development, products have gotten more sophisticated and, reportedly, more effective. And the sell is heavy on the wonders of science — particularly for the newest category of "anti-aging" products. Ads are full of catchy phrases like, "Penetrates the skin's inter-cellular levels with advanced microcarriers" and "Helps restructurize the deepest epidermal layers." Today, "She's lovely — and

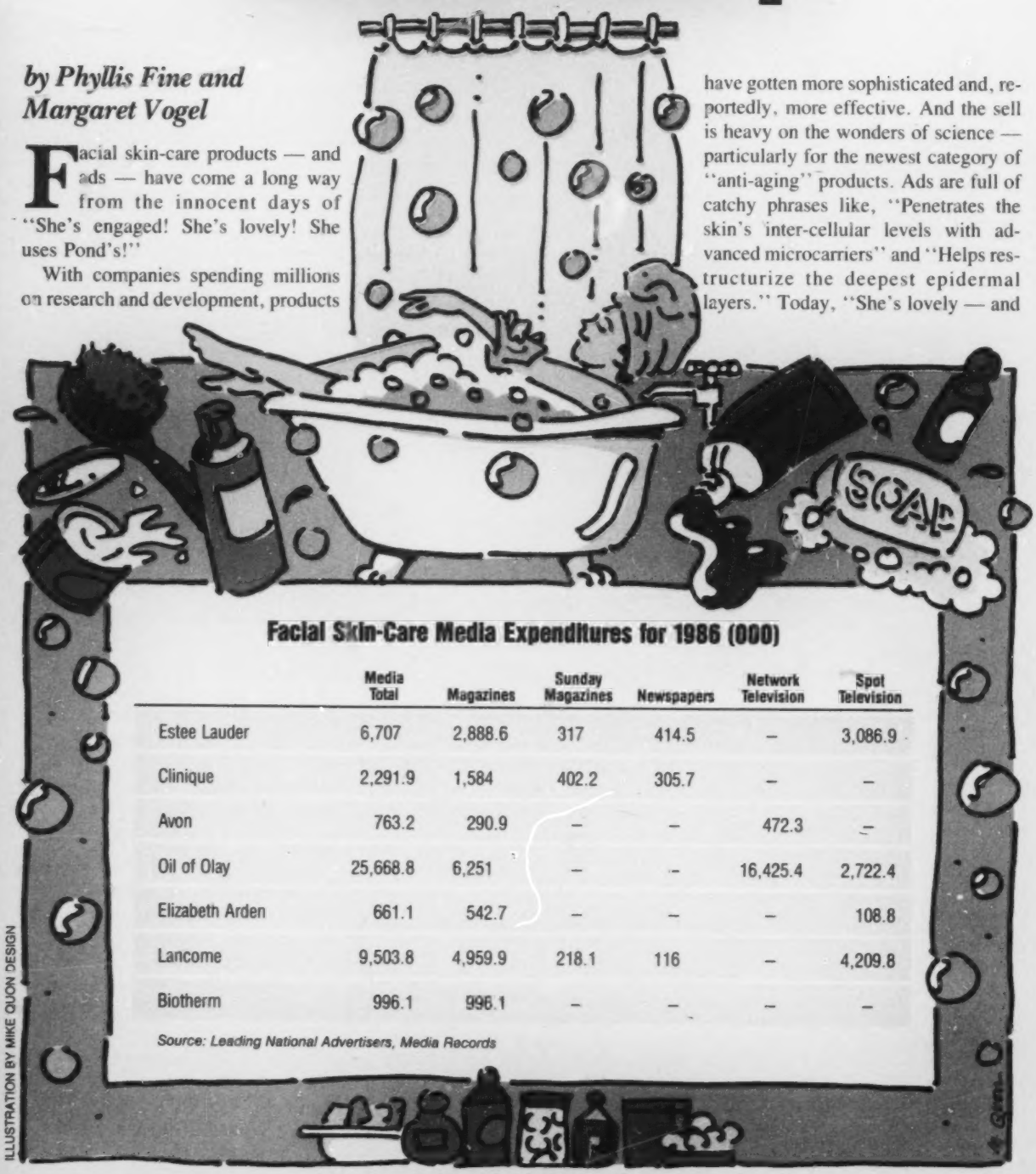


ILLUSTRATION BY MIKE QUON DESIGN

Facial Skin-Care Media Expenditures for 1986 (000)

	Media Total	Magazines	Sunday Magazines	Newspapers	Network Television	Spot Television
Estee Lauder	6,707	2,888.6	317	414.5	–	3,086.9
Clinique	2,291.9	1,584	402.2	305.7	–	–
Avon	763.2	290.9	–	–	472.3	–
Oil of Olay	25,668.8	6,251	–	–	16,425.4	2,722.4
Elizabeth Arden	661.1	542.7	–	–	–	108.8
Lancome	9,503.8	4,959.9	218.1	116	–	4,209.8
Biotherm	996.1	996.1	–	–	–	–

Source: Leading National Advertisers, Media Records

she has a Ph.D. in biochemistry'' might be more to the point.

This scientific positioning has helped stimulate healthy sales: over $2 billion in 1986, according to market research firm C.H. Kline.

This year, ''Unit sales are up, though there's far from double-digit growth,'' reports Nancy Hall, vice president, Smith, Barney, Harris & Upham. Kline predicts annual growth through 1991 at slightly above 7% for the total U.S. skin-care market, with projections for the moisturizer category alone set at 8%.

It's not just the scientific pitch that has helped to build strong business. That demographic cliché, the baby boomer, has been aging and noticing signs of her maturity in the mirror: fine lines, crow's feet, sagging skin. The long-term fitness boom, with its emphasis on taking care of oneself, has also fueled product interest. Too, with more and more women in the workforce, there's an emphasis on looking good — and looking young.

(Not to be sexist about it, men want to look young, too. Sales of men's skin-care products, tracked at an estimated $28 million for 1987 by market research firm FIND/SVP, are growing at a rate of about 5% annually. But men's and women's skin care are two distinct and separate markets — except for the crossover group, identified by industry experts as men who use their wives' or girlfriends' moisturizer regardless of which brand's in the medicine cabinet.)

In-store, specific Lauder products are anchors for full-line pitches.

Both baby boomers and working women have the discretionary income to spend on skin-care products. And discretionary income is exactly what's needed. Most of the best-selling brands don't come cheap; an average price is about $35 to $40 for less than an ounce of product.

As befits their price range, the best-selling lines are sold mostly in department and specialty stores. According to C.H. Kline, these upscale outlets account for over half — from 50% to 60% — of facial product sales, with mass outlets (including such direct marketers as Avon and Mary Kay) handling the remainder of business.

Actually, notes Smith, Barney's Hall, for several years there's been a real lack of skin-care products available in mass retail outlets. Sales there have been dominated by a very few lines, most notably Richardson-Vicks' Oil of Olay and Almay, now owned by Revlon. Companies setting out to fill the gap include Colgate-Palmolive, with Lournay, a new line for sensitive skin due in January; Noxell, planning a launch soon; and Beiersdorf, which recently added Visage to its Nivea line.

One reason for the hole in mass-market retail was the absence of individualized in-store service. The new generation of skin-care products often has a complicated story to tell. Mass marketers had to depend on advertising

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or label copy to get the application message across, so easy-to-use products such as Oil of Olay did well.

Conversely, the helpful, trained department store salesperson acts as a guide to the complications of today's scientific wonder products. ("What's a revitalizer? Is it different from a restorative cream?" one might murmur in despair at the softly-lit counter). Sometimes, the prerequisite for Advanced Skin Care 101 goes beyond a degree in biochemistry to a working knowledge of French. At least one line gives its products French names only. (What's a *Masque Raffermisante*, guys? *Habla Espanöl*, anyone?)

Since making a skin-care purchase can be such serious business, it's no wonder that "women tend to be far more brand loyal" to this product category than to other cosmetics items, notes Tony Michaels, Lancome's vice president of sales and marketing. And according to a 1986 poll of *Cosmopolitan* magazine's Consumer Panel done by Beta Research, "Reliance on brand [for moisturizers] goes up as personal income increases."

Single-purpose products with a science sell help to simplify the marketing of some of the skin-care lines.

Another way of simplifying the consumer's purchase decision is the recent trend toward marketing and advertising single-purpose items, instead of pushing a total skin-care regimen. This trend works, says Leonard Ichton, divisional merchandise manager for cosmetics at Filene's, Boston, since "single-item treatment products are easy to understand and more consumer-directed than regimens." The recent launches of such items as Lauder's Eyzone, Lancome's Niosome and Dior's Capture have caught the consumer's interest and built solid sales, adds Ichton.

Marketing of these new single-item products again focuses on the high-tech science sell. However, this dependence on scientific claims now has its downside: intervention from the Food and Drug Administration (FDA). Last spring, the FDA challenged the product claims of 23 skin care marketers (see "On The Docket," pg 148). At issue is not product effectiveness, but whether the language used on labels and in promotional materials goes beyond the realm of cosmetic claims into drug claims. The difference — cosmetics are supposed to affect the skin on a surface level only, while drugs can affect skin's structure or function. Thus, for the FDA, words like "moisturizing," "smoothing" and "softening" were legitimate cosmetic claims. But promises of "cellular renewal," "regeneration," and "restructuring" were deemed out of bounds.

This is more than a semantic exercise for skin-care marketers. The reclassification of cosmetic products into over-the-counter drugs would mean expensive years of testing, since government regulations are much stricter for the drug category.

Even though a final ruling has yet to be handed down, it is likely that the cosmetics industry will modify its product claims. But the outcome is bound to affect the direction of product advertising for years to come.

One of the first targets of the FDA crackdown was Glycel, which soon became its first casualty as well. The line was introduced with a tremendous amount of hoopla in 1986, including an ad campaign with noted heart surgeon Christiaan Barnard as spokesperson. Glycel tracked record sales of $15 million in its first year. But its high visibility backfired almost at once, resulting in FDA and Federal Trade Commission investigations, stockholder lawsuits and criticism of Barnard's medical image being used for promotion. Alfin Fragrances, distributors of Glycel and two other skin-care lines, abruptly backed out of the skin-care business altogether in July.

There were also more prosaic mar-

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keting reasons for Glycel's fall from grace. According to independent industry consultant Allan Mottus, the brand took off so quickly, the company decided it didn't need to invest in training or retail promotion. This lack of follow-through killed the brand's initial momentum.

The ultimate lesson from Glycel's fall reflects the state of the cosmetics industry as a whole: no get-rich-quick dollars here. More than ever, marketing skin care requires lots of money and extensive manpower. All the top-selling skin-care lines profiled are backed by large, powerful corporate entities. Some of these corporate alliances are fairly recent — Procter & Gamble bought Richardson-Vicks in 1985 and Fabergé just acquired Elizabeth Arden. But the huge corporate face, as in many industries, seems to be the wave of the future. Revlon, for example, which has been gobbling at least one smaller company a year since its purchase by Pantry Pride in 1985, this year bought two second-string companies known for their skin-care products — Charles of the Ritz and Germaine Monteil.

More than ever, marketing skin-care products means lots of money and manpower; in other words, big business.

Advertisers spent $141.6 million on this product category (facial cleansers, make-up removers, creams, lotions, oils, according to LNA) last year, a slight drop from $144.6 million the year before. Print is a major factor, with a combined total of $71.9 million for both magazines and newspaper supplements. Advertisers have been depending on copy-intensive ads to get scientific claims across. According to Publishers Information Bureau figures, *Vogue* was the top-selling book in the skin-care category in 1986 — not surprising, considering its upscale positioning.

The best-selling brands in this report were chosen by their ranking by manufacturers' wholesale dollars, as tracked by C.H. Kline. Since total figures were taken into account, both class and mass brands were included. The Goldman Sachs survey of department-store buyers provided a cross-check to Kline's figures on class brands, and the findings matched: buyers ranked Lauder, Clinique, Lancome and Arden as bestsellers at retail, too. According to the survey, these brands' top "rankings have been unchanged for the past several surveys, pointing out the highly concentrated nature of the prestige treatment market."

ESTEE LAUDER

It would be difficult, if not impossible, to talk about the leaders in skin care in the 1980s without talking about Estee Lauder. Lauder has been recognized as the number-one skin-care seller and undisputed innovator year after year. Industry wise-cracks often focus on the "Follow the Lauder" mentality of many skin-care companies, from mass to class, who knock off the company's products. It's hard to blame them. Since the introduction of Night Repair in 1982, Estee Lauder has introduced one best-selling treatment product after another. Over $100 million of Lauder's wholesale dollars now come from this group of specialty products.

Dianne Osborne, vice president of marketing for skin-treatment products, credits tremendous research and development (R&D) for the company's winning streak. "Years ago, marketing people could sit and dream up the next type of skin-care product to be promoted. Now, however, the innovations are coming from very serious efforts in R&D, and we are reaping the benefits."

Helping Lauder sell skin care born out of the laboratory instead of the marketing department is a host of women's magazines giving more sophisticated coverage to the complex and often

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medically technical story of skin care in the '80s, according to Osborne. Lauder uses all the major beauty books extensively to tell its skin-care story. For example, a typical Lauder print plan for Eyzone, its most recently launched product, calls for magazines like *Vogue, Harper's Bazaar, Self* and *Mademoiselle*. Television is used too, but its schedule varies since it's always tied to a store in the area.

In-store, Lauder makes extensive use of clinics. While they may use a specific product as a hook — such as the recently-launched Eyzone — clinics stress "total treatment" and usually include a skin-care analysis encompassing the full line of products.

In Lauder's current print campaign for Eyzone and Night Repair, two-page spreads combine a black-and-white photo of a woman with a color shot of the products themselves. The focus on products highlights their common hook: unusual formulas and delivery systems. Night Repair is put on with an eyedropper, while Eyzone, unlike most milky colored eye creams, is a gel with "opalescent strands" suspended in it. It is these first-of-their-kind presentations that make the products stand out in consumers' minds, Osborne contends, regardless of how many imitators may follow.

Clinique associates its products with people's daily personal routines.

CLINIQUE

"You don't mess with success. If you do, you're nuts." That's Allan Mottus on Clinique's marketing consistency, which has led to amazing longevity as a bestseller. The Estee Lauder division sells about $100 million of skin-care products at wholesale prices annually. With its famous "Twice a Day" ads, which equate using Clinique and brushing one's teeth, "they've been selling skin care as part of daily hygiene, and never deviating," says Mottus. "[It's been something like] 13 years with the same campaign."

Clinique combines both regimen and single-item marketing in its ad campaign, created by AC&R Advertising. The "Twice a Day" color spread, which pushes the company's basic regimen of soap, toner and moisturizer, is reinforced by black-and-white single page ads which focus on the benefits of newer items as they are introduced. Magazines include *Self, Glamour, Vogue* and the *New York Times Magazine*. According to Leading National Advertisers, the company spent no money in tv in 1985 and 1986.

Department stores have separate Lauder and Clinique counters, and many people do not even know of the connection between them. With its simplified regimen approach and comparatively moderate price points ($8.50-$13.50 for the three-step regimen, up to around $38.50 for more sophisticated products), Clinique generally attracts the younger consumer who is just beginning to haunt department-store counters, according to

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Smith, Barney's Nancy Hall.

Clinique was begun as a hypoallergenic line, with salespeople wearing white lab coats to "imply clean laboratory conditions," according to Estee Lauder in her autobiography, *Estee, A Success Story*. However, its appeal quickly broadened to a more general consumer base. Today, while the black-and-white print ads do say "Allergy Tested" and "100% Fragrance Free," Clinique's hypoallergenic stance in its ads is fairly muted.

At the retail level, Clinique uses the standard Lauder promotional technique of gift-with-purchase — an effective strategy for sampling and increasing in-store traffic. The company also does cross-merchandising.

Avon's in-house brochure for its products goes to a big audience: 15 million women every two weeks.

AVON

While most of the big guns in skin treatment are aiming their marketing efforts at department stores, who's minding the mass market? At least one heavy hitter: Avon. It is estimated that the doorbell-ringing company has rung up $70 million to $80 million in sales for the specialized treatment group of products. And because of its tradition of door-to-door selling, Avon has been able to do what few other mass-market brands have done — combine moderate prices with the service offered in department stores.

Key to this service is the "Avon Lady" herself, who for more than 100 years has provided the ultimate in one-to-one attention — she comes to the customer directly. "Skin-care products are often complicated," says Katherine Dwyer, Avon's group product director for skin care in the U.S. "Products sitting on drugstore shelves can't do the same educational job our representatives can."

But with women in the workforce in droves, Avon has established a group of reps who make office calls. At work, the Avon representative can just leave her brochure on a desk and let it do the talking. Avon's brochure is the cornerstone of its marketing strategy, working as both a selling floor and an advertising forum. Created in-house and published 26 times a year, the brochure reaches a remarkably high target audience: 15 million women every two weeks.

In 1986 the company began its first move into the more sophisticated realm of skin-care with BioAdvance, an anti-aging moisturizer. Its launch cost more than other single product in Avon's 100-year history ($2 million). In the first nine months on the market, Avon representatives sold more than $12 million worth of the product.

On the side, Avon may dabble a bit in print advertising when there's an important breakthrough product to talk about, like BioAdvance, but has cut back even here recently. According to LNA, Avon's total skin-care expenditures plunged from its 1985 level of $5.5 million for skin creams and lotions to $763,000 in 1986. BioAdvance, which was advertised only in magazines, accounted for $290,900 of the company's skin-care total. Avon uses N W Ayer for most of its advertising, while Uniworld handles Avon's advertising to the ethnic market.

OIL OF OLAY

Richardson-Vick's Oil of Olay is different from other best-sellers in two ways. It's the only one sold at mass-market retail outlets such as drugstores, and its marketing and advertising have shied away from the highly technical "anti-aging" claims.

Its currently-launched campaign, with the theme, "I'm not going to grow old gracefully," continues the "feeling of woman-to-woman sharing" that is key to Olay ads, says a company spokesperson. The print ads feature close-up shots of five different women; tv commercials show two, each

Oil of Olay uses many magazines to reach "women of all ages."

"speaking directly into the camera about her feelings and experiences."

The campaign — which according to Mottus is "the best one around today" — includes five pages of print placement, along with a prime-time tv schedule. Since Olay is after women from a wide age and income group, the company uses magazines ranging from the service-oriented "Seven Sisters," to *Cosmopolitan*, to *Self*, *Glamour* and *Vogue*.

Such an aggressive advertising move may have been stimulated by the company's reported slippage of market share. But Richardson-Vicks has always spent big in promoting Olay — especially since its acquisition by P&G.

Estimates on the company's volume of business in the treatment field vary dramatically. Some put it around $50 million, others peg it at $100 million. Its 1986 $25.6 million figure for ad expenditures, while a drop from the 1985 figure ($29.8 million), was still the largest in the total category.

The company also recently changed its package for a "softer, more upscale look." The formerly solid pink carton is now enlivened by a "subtle, tone-on-tone grey pinstripe."

Borrowing traditional department-store tactics, Richardson-Vick's did some give-away sampling when it introduced Oil of Olay's line extensions: Olay Beauty Cream, in 1985, followed by a group of cleansing products, Olay

Beauty Bar and Beauty Cleanser. Night of Olay was the first extension, introduced in 1978. A check of several outlets in the New York area revealed a range of prices from from around $3 to $16.

Advertising has been handled by Wells, Rich, Greene since 1986. Prior to the company's acquisition by Procter & Gamble in 1985, Young & Rubicam was Olay's agency.

ELIZABETH ARDEN

Fabergé's very recent purchase of Elizabeth Arden from pharmaceutical house Eli Lilly (closing date was reportedly November 10) may well be a turning point in the course of Arden's advertising and marketing strategies.

Industry speculation on what will happen to Arden and its $50 million worth of treatment business under new owners has centered around the character of Fabergé's chairman and CEO Daniel Manella. His reputation as a bottom-line performer was bolstered by a recent speech he made before the trade group Cosmetic Executive Women. Without revealing too many specifics, Manella said his plans for Arden will focus on increasing profitability, staying in full charge of the "back office" financial functions while the Arden staff makes its own marketing decisions.

But Manella may very well make some marketing decisions himself. Noting that "you have to spend money to make money," Manella said that he plans to increase ad expenditures "immediately," bringing in "one or two ad agencies." (The company's advertising is currently in-house.)

As of last year, about 80% of the company's $661,000 ad budget went for print advertising in such vehicles as *Vogue* and *Glamour*. Most of its print ads had a regional retailer tag.

But even though new chief Manella promised more for ads, he also has been stressing cost efficiencies. In that same talk, he discussed his role in Fabergé's 1984 acquisition by MacGregor Industries, and how he eliminated brands and cut operating costs. So, as a spokeswoman noted, one of the expected changes at Arden will be a trimming of various product lines — including skin care. Currently, there are six lines, with price points that range from around $20 to $65.

Fabergé's Manella will up ad expenditures for Arden "immediately."

Traditionally, Arden was a low-profile company with a reputation for fine skin-care products. The category was advertised little, but its slightly older customers were loyal enough to make Arden a top seller year after year, according to the Goldman Sachs survey of department-store buyers.

Arden veered off this staid course a bit in 1983, when Lip-Fix, a specialty skin-care item designed to make lipstick application neater, became a runaway success, spawning many mass-market imitations. Though the larger upscale skin care companies never di-

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rectly copied the product, the marketing strategy behind Lip-Fix — promoting a single product that addresses a very specific skin-care need — became standard in the industry. Arden did increase its ad budget during the years of the Lip-Fix craze, according to one source, even branching out into spot radio.

A recent print ad for one of the company's best-selling lines, Visible Difference, had the headline "Results, Not Miracles" and focused on product benefits, "proven results" that were not as high-tech as many of the other lines.

LANCOME

Lancome is one of the strongest divisions of international beauty power Cosmair, and over the past few years, it has become a major force in treatment products. So strongly does Cosmair believe in specialty treatment products that, in 1985, it began a new U.S. division, Biotherm, with products both in body treatment (for smoothing skin below the neck) as well as facial skin care. Together, the two divisions have about $50 million in treatment sales, with Lancome holding the lion's share of sales.

Lancome's French connection gives its line a certain cachet.

Lancome's "French cachet" (product names on the packages are printed in both French and English) has been a strong factor in the brand's success, according to Tony Michaels, vice president of marketing and advertising. The company built on this allure by "learning how to translate French products to the American market," gearing them to the U.S. lifestyle. For example, a moisturizer such as TransHydrix is marketed not only as a moisturizer but as protection against what air travel, heat, air conditioning and pollution do to the skin.

The print ad campaign, created by the agency Intermarco Advertising, zeroes in on the benefits of a single product for each separate ad. The "result is what pops first from an ad," says Michaels, such as the "Down with Puffiness" head for Forte-Vital Eye Creme. Skin-care ads are always in black and white, while color cosmetics are in color. Actress Isabella Rossellini appears in each ad as an unidentified face.

The current print schedule includes "all major fashion and beauty books," including *Vogue* and *Harper's Bazaar*, along with such upscale lifestyle books as *House and Garden* and *Vanity Fair*. Co-op tv ads are done regionally.

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THE SATURDAY EVENING POST

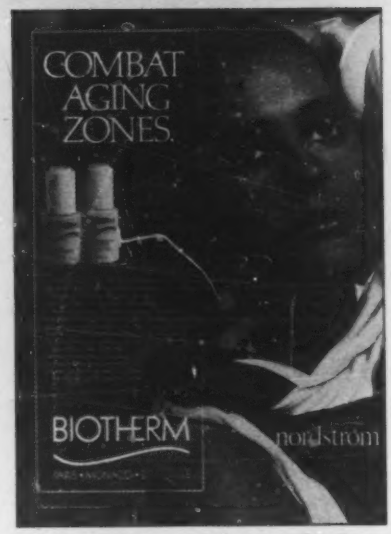
Source: MRI Spring 1987

Like many prestige brands, Lancome places great importance on training its counter reps. Salespeople are trained to sell by priority needs, gearing the "pitch to what the customer says she needs first. If she comes in complaining about little crow's feet, we have a product that addresses that problem," says Michaels. Salespeople are expected to build a base for eventually selling a complete regimen.

Often the company will hold in-store clinics off the cosmetics floor, where customers can "get a mini-facial." Promotional gifts-with-purchase are a "healthy mix of skin care and makeup, so the consumer can sample."

BIOTHERM

One of Cosmair's big success stories in the treatment field is being written by Biotherm, a long-standing French brand first launched in the U.S. in 1985. "Our original thrust was the body-care market [creams and lotions that smooth the skin below the neck], but we've slowly been developing a strong franchise in skin care as well," notes Biotherm's vice president of marketing and advertising, Margaret Sharkey Kelly. To further develop its skin-care segment, the company plans to launch more facial products in 1988.



Biotherm stays in glamour books to hit the 30- to 45-year-old woman.

The print ad campaign, created by Geers, Gross, is "very factual," says Kelly. "We've kept copy short and to the point," with blue and white visuals tied to the look of the packaging and the department store counter. Initial spending was not high — $996,100 for 1986, according to Leading National Advertisers. "Since we're a young company, we don't have a very developed media plan. We concentrate on advertising our key products in the major beauty books — *Glamour, Vogue, Elle, Harper's Bazaar*" — to target the company's strongest consumer base, women between 30 and 45. Also on the schedule is the premiere issue of *Lear's*. Currently the company does no tv advertising.

According to Kelly, "What's most essential at this point is what goes on in-store between the beauty advisor and customer." As part of its plan to "develop personal rapport with customers," Biotherm has developed a consumer club, Centre Biotherm. Women can sign up for the club at the counter without making a purchase and get a newsletter, the chance to get free products after six purchases and discounts on such items as *American Health* magazine's fitness video. ■

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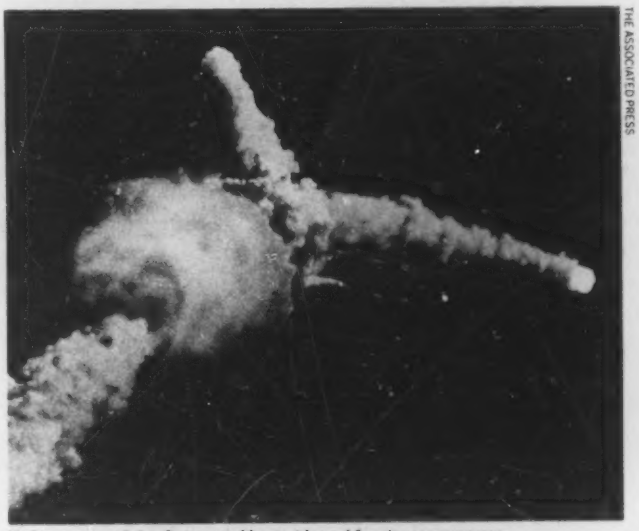
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These are products that offer something more for your money, or perhaps more for *more* money. They are perceived as "better" than Brand X, Y or Z and are perceived as having the competitive edge.

This competition isn't limited to the supermarket shelf. In almost all aspects of our lives, we seek to be and obtain the best, including in our careers. So what is our edge in climbing that ladder? Certainly experience, technical skills and management ability all count. But these develop *as* we climb upward. However, one of the first "rungs" will also have tremendous influence over the rest of our careers: education.

Fifty years ago, the workforce was coming out of a depression. Few could find a job, let alone attend college to prepare for one. After World War II, an amazing phenomenon occurred: college education for the masses, not just the privileged. The G.I. Bill made the bachelor's degree easily obtainable. In addition, we became "career mobile." Getting the gold watch after 40 years of service was no longer the ultimate pot of gold. We realized that another company might be willing to pay a little extra for our skills.

Today? The advanced degree will help to ensure our competitive edge.

I'm not opposing the liberal-arts degree. Its merits are many: exposure to a broad range of subject matter and ideas, challenging one to see multiple dimensions of an issue and teaching one to think. But this macro view, as much as it contributes to the total person, must be supplemented by a more specific education.

The advanced degree provides several advantages. First, it exposes one to the specific subject matter in a safe environment. Although a case study may involve decisions affecting millions of dollars and thousands of employees, it's theoretical. There's no real risk other than the grade to be earned. Without this type of "role play," an individual is thrust into work situations not of the same magnitude but nevertheless real. The ability to analyze, assess, conclude and recommend is best practiced in the classroom first and the office second.

Also, the classroom environment is more conducive to objectivity than the more political workplace. Let differing views be expressed without fear of being called insubordinate or malcontent. Let the many sides of a problem or the risks of an opportunity be explored, so the individual will know that the right answer isn't always yes.

Finally, our business world is becoming more focused and more aggressive. The "up or out" philosophy has become mandatory as companies downsize, consolidating both operations and positions to improve profits and efficiencies. Employers can no longer afford to train an employee to eventually become a contributor. The contribution must be there *now*.

The advanced or specialized degree means the employee will be able to perform certain tasks, understand specific concepts and therefore contribute immediately.

Certainly, the ultimate competition for any of us is achievement and progress over time. Many factors — interpersonal skills, creativity, intelligence, technical competence — will be judged. But when adding up the final score, the points for education may push the winner over the edge.

Barbara Provus is a founder and principal of Sweeney Shepherd, a retainer, senior-level search firm headquartered in Chicago.

OUR READERS TELL US . . .

Research USA, Chicago, recently polled readers on their attitudes towards education. (Base = 104 unless specified.)

1. In hiring, which do you feel is more attractive in a prospective employee?

A liberal-arts education	50.0%
A more specific education	49.0%
No answer	1.0%

2. Are the starting salaries the same within your department for both types of candidates?

Yes	70.2
No	29.8

If "no," which commands a high salary? (Base = 31.)

Liberal-arts education	—
Discipline-specific education	100.0

3. For which of the following po tions do you have hiring authori (Check all that apply.)

Marketing	91.
Finance	6.
Advertising	67.
Communications	33.
Management	36.
Other	19.

DAY BY DAY

"Success is a journey, not a destination," said Mike Carr, *Playboy*'s vice president/advertising director, when we were discussing his search for a new marketing director earlier this year. In my opinion, putting MBA after one's name is just one of the stops along a career track.

Dr. Jeanne M. Lynch, associate professor of managerial policy and organization at Rensselaer Polytechnic Institute's School of Management, who also spent over 20 years outside academia in the real world of business, made a similar point when we discussed this column. "Training, as in getting an MBA, is designed to earn," she said. "Education is meant to learn. And you must learn all your life."

Today, professionals must be generalists with some area of specialization gained early on at the *workplace*, rather than through postgraduate education. Simply stated, whether it's a job assignment to find a "new breed" media director or an agency account director or even a space salesman, the specs call for people who have a broad-based education (i.e., liberal arts), a broad perspective and selectively gained practical skills.

The *New York Times* "Careers" columnist Elizabeth Fowler found support for my point of view. In her first column of 1987, her most significant quote came from Professor G.C. Parker of Stanford's Graduate School of Business. He said, "Well prepared managers of the next generation will simply need more than the nation's schools of business can provide. Those needs can best be addressed in the liberal arts. In the next century," he continued, "managers must understand foreign cultures, languages, politics *and* business practices."

In my conversation with Dr. Lynch of Rensselaer, she noted, "Liberal arts provide not only an education in philosophy and the social sciences, but all important, education in thinking — logic — and also very importantly, rhetoric."

Fowler's column contained similar comments from leading educators, backed by reports from Fortune 100 company managements.

As this column is written, the worldwide securities markets have been in a downward tizzy resulting in severe down-sizing, particularly among the MBA contingent that headed to Wall Street, where their heavily financially focused training could gain them six-figure earnings before they reached their 30s. With over 65,000 MBA graduates each year, these people are going to have difficulties finding other employment. Alternative career routes, suggested by several classy "retainer" recruiters in Fowler's column of October 20, 1987, were accounting and insurance firms and becoming a CPA. None of these alternatives offer great compensation levels, challenges or ego gratification.

From what I hear and read every day, we are on the forefront of a new era in business: the opening of the American mind, when a B.A. with a Liberal Arts major and an Economics minor with a high GPA will be far more valuable on a career track than a narrowly focused MBA from less than a Class A graduate business school.

Mike Carr, by the way, wanted an all-purpose marketing director. After a three-month search, one was found who had worked in the magazine field and in broadcast promotion as well. That young lady has a bachelor of arts degree from Skidmore, a college noted for its liberal-arts focus, but her major was in business.

Roger C. Bumstead is vice president and head of media sales and services and research divisions of Jerry Fields Associates, an executive recruitment firm serving the advertising community.

4. How important is a master's degree in business administration (MBA) in weighing a candidate's credentials?	
Required	3.8%
Very important	15.4%
Somewhat important	51.0%
Not very important	20.2%
Not at all important	9.6%
5. Do you encourage your employees to pursue MBAs?	
Yes	61.5%
No	38.5%
If "yes," does your company help finance this education? (Base = 64.)	
Yes	92.1%
No	6.3%
No answer	1.6%
6. Does a candidate with an MBA command a higher starting salary?	
Yes	65.4%
No	32.7%
No answer	1.9%
If "yes," what is the premium paid for an MBA candidate? (Base = 68.)	
$1,000 to $5,000 a year	45.5%
$6,000 to $10,000 a year	33.8%
$11,000 to $15,000 a year	7.4%
$16,000 to $20,000 a year	1.5%
Over $20,000 a year	—%
No answer	11.8%
7. Do you have an MBA?	
Yes	42.3%
No	56.7%
No answer	1.0%

ECONOMIC EYE

CBS EYES 1990

Television Information Office reports that CBS/Broadcast Group is predicting a combined 70% prime-time share for the Big Three networks by 1990. That's a three-point drop from the past tv year and a 12-point drop from 1980. Nets lost an additional eight points in 1970-1980 period.

MAGAZINE AD SCORECARD

	Ad Pages Oct. 1987	% change from Oct. 1986	Dollars spent (000)	% change from Oct. 1986
1. Skin Care Creams, Lotions and Oils	206.28	+3.3%	$ 6,933.2	+12.0%
2. Lip and Eye Beauty Products	124.66	+2.7	4,751.5	+19.6
3. Scents and Fragrances	202.94	−7.2	5,860.3	−2.5
4. Facial Makeup Products	127.06	+24.3	4,508.2	+17.8
5. Prepared Dinners and Entrees (including Pizza)	30.03	−60.0	2,337.1	−47.6
6. Liquor	417.69	+1.6	18,449.7	+12.4
7. Cigarettes	592.32	−3.2	31,092.6	−1.0
8. Soaps and Detergents	57.08	−6.7	3,462.3	−11.1
9. Passenger Cars, Domestic	320.65	−21.6	21,325.9	+1.8
10. Passenger Cars, Imported	338.12	+14.3	18,083.6	+16.5

Source: Publishers Information Bureau as prepared by Leading National Advertisers

MEDIA COST INDEX

1985 = 100

1987

	Jan.	% change	Feb.	% change	Mar.	% change	Apr.	% change	May	% change	June	% change	July	% change	Aug.	% change
Network TV																
Daytime	92	−9	86	−9	88	−8	92	−6	92	−6	95	−1	98	−5	85	−11
Nighttime	106	+0	105	+8	112	+7	99	+8	110	+6	112	+3	109	+2	113	+5
Spot TV																
Prime time	129	+7	133	+11	131	+13	134	+16	136	+14	130	+9	–	–	–	–
Daytime	130	+5	108	−0	108	−0	116	+11	118	+8	104	−1	–	–	–	–
Network radio	139	+14	130	+12	126	+11	116	+4	116	+2	114	−1	102	−0	104	−1
Spot radio	←		101	−1	→		←		98	+3	→		–	–	–	..
Consumer magazines	109	+4	109	+3	110	+4	109	+3	109	+3	109	+3	109	+3	109	+3
Natl. Sunday mags	103	+11	103	+11	103	+11	103	+11	103	+11	103	+7	103	+7	113	+7
Business publications	111	+5	111	+5	111	+5	111	+5	111	+5	111	+5	111	+5	111	+5
Newspapers	116	+8	116	+8	116	+8	116	+8	116	+8	116	+7	115	+7	115	+7
Outdoor	111	+6	111	+6	111	+6	114	+6	114	+6	114	+6	114	+6	114	+6

Notes: Percentage shown is relative change from the same month/period the year before.

1985 = 100

Sources:

Nighttime Network TV—Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Reports' (BAR) Network TV Service.

Daytime Network TV—Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service.

Network Radio—Cost per average 30-second radio announcement from BAR's Network Radio Service.

Consumer Magazines estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn.

National Sunday Mags estimate based on published (rate cards) costs of a page, four-color in the national entries.

Daily Newspapers estimate based on Newspaper Advertising Bureau report of SRDS costs per column inch of a sample of 784 newspapers weighted to represent the universe.

Outdoor Posters based on estimate prepared by Institute of Outdoor Advertising.

Spot Radio index represents cost of a 60-second spot in the top 100 markets from data supplied to Radio Expenditure Reports by major radio representatives.

Business Publications estimate based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications.